Intuit ProSeries® Tax

25 Time-Saving Features

	Feature	How does it work?
1	Line Sensitive Help	Trace the source of field data, or use it to understand what information you should include in a particular field.
2	Where Do I Enter feature	Use **Where Do I Enter** dialogue to find the appropriate form and field when you are not sure where to enter certain data into your client's return.
3	Missing Client Data	Keep track of all of the missing client data in a return. Then, track the status, email the client a request, and quickly link back to the field location as you receive updates on the missing data.
4	Managing E-File Status	View, track the status, and manage E-filed returns.
5	Client Checklist	Create a list of items needed for this year's return, based on last year's return. Also, an encrypted version of the list can be emailed.
6	Client Invoice	Set up client specific billing options using different billing methods (flat fees, hourly fees or charges per form). **In Pro only:** Also includes a billing clock and editable invoice.
7	Import from QuickBooks, Quicken and TXF	Import financial data directly to ProSeries from key resources, including QuickBooks, Quicken and TXF (Tax Exchange Format).
8	In-Product Chat	Allows for quick answers without having to leave the return or call in to **Support** so you can get help even while working with a client.
9	Constant On-Screen Help	Information about the line you are currently on links to most common support question; includes **"Ask ProSeries" Search Help**.
10	K1 Transfer	Import information from the Schedule(s) K-1 in a ProSeries 1065, 1120S or 1041 client file to Schedule K-1 worksheet(s) in a client's Form 1040 return.
11	MFJ/MFS Split	Use the **Split Joint Return** feature to split a Married Filing Joint Individual return into two separate Married Filing Separate returns for the taxpayer and spouse, without calculating by hand, preparing multiple returns, or changing the original return.
12	Client Snapshot	Quickly access and review summary information on the client return.

25 Time-Saving Features (continued)

	Feature	How does it work?
13	Keyboard Shortcuts	Use keyboard shortcuts to move around quickly in the software.
14	Quick Entry Sheets	Use these worksheets to quickly enter data into the input fields of the actual forms. From these worksheets you can also toggle back to the specific form as well.
15	Client Status	Review and keep track of the progress and status of a client return with this summary audit report.
16	Client Presentation	Provide your clients with visually appealing charts and graphs on bottom line, income and deductions, and comparisons with prior years.
17	Email PDFs from within ProSeries	Email password-protected client returns directly from within ProSeries.
18	Client Advisor	Generate a list of up to 71 tax planning suggestions on how your clients can help reduce their future taxes.
19	Tax Planner	Estimate tax payments, witholdings, income expenses, etc, over a number of years.
20	Task Scheduler	Set up your ProSeries software to automatically download updates to the software for any program and forms changes, as well as e-File acknowledgements and tax alerts.
21	PDF Attachment to E-File	Attach PDFs to Individual 1040 and State E-filed returns.
22	Download Next Year's Product	Use this year's ProSeries to automatically download next year's product.
23	Financial Institution Download	Download your client's 1099-B, 1099-INT and 1099-DIV data directly from participating financial institutions by way of a website that is easy for you and your clients to use and access. This is fully integrated and included with ProSeries.
24	Multi-Year e-File	E-File returns, and other supported forms accepted for prior years (2-years back).
25	Fixed Asset Manager Import	Import assets into the different activities in ProSeries, such as Schedule C, Schedule E, etc. directly from ProSeries FAM.